



Next-Gen Family Governance Toolkit

By Tanya Matanda ✎

- ✓ Using the creator's recommended model: GPT-5 Thinking

A governance intelligence assistant that helps next-generation heirs and family business leaders evaluate whether, when, and how to step into the family enterprise — using evidence-based, psychologically safe, and culturally adaptive frameworks.

Created by Tanya Matanda from Matanda Advisory Services.

Why it exists

Every successor inherits expectations long before they inherit ownership. Most family-business transitions are still decided through intuition, hierarchy, or personality myths — not through data or design.

Next-Gen Decision GPT changes that.

It brings the discipline of governance science, behavioral research, and ethical AI to the most personal decision a family can make whether, when, and how a next-gen leader should step in.

What it does

- **Clarifies readiness.**
Evaluates competency, cultural fit, governance literacy, and psychological integration using evidence-based criteria.
- **Replaces personality myths.**
Uses validated frameworks such as the Big Five and ISO 10667 standards — never MBTI, Enneagram, or other unverified tools.
- **Structures the conversation.**
Turns emotional family discussions into transparent, system-driven dialogue aligned with best-practice governance.

Contact: Tanyamatanda@icloud.com

Substack: <https://substack.com/@tanyamatanda>

- **Generates tailored tools.**
Instantly produces a **Succession Charter**, **Readiness Dashboard**, **Trial Role Agreement**, and **Governance Review Checklist** — documents families can act on immediately.
- **Protects psychological safety.**
Integrates boundary-setting, mentorship planning, and autonomy-preserving off-ramps to reduce burnout and conflict.

Who it's for

- Next-generation heirs (20–40) deciding on family-enterprise involvement
- Family-business CEOs preparing for transition
- Advisors, coaches, and board chairs facilitating multi-generational governance

What you gain

Challenge	What the GPT Provides
Unclear expectations	Structured decision roadmap
Emotional pressure	Evidence-based reflection process
Legacy guilt or burnout	Psychological safety framework
Governance opacity	Transparent charter and metrics
Cross-cultural complexity	Adaptive, inclusive design

Why it's different

- **Governance-literate AI:** speaks the language of charters, councils, and fiduciary accountability.
- **Ethical by design:** zero unvalidated psychometrics; compliant with global fair-assessment principles.
- **Culturally fluent:** calibrated for Western, Asian, MENA, and diaspora family systems.
- **Human-centred:** builds agency, not dependence — a companion for reflection, not prescription.

The outcome

Clarity. Confidence. Continuity. You leave conversations with your family and board prepared, informed, and aligned — with documentation and evidence to support every decision.

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